



*The*  
**STRATEGY**  
**GROUP, LLC**

BETH-EL CENTER, INC.  
STRATEGIC PLAN  
2019-2021

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## Introduction

In the spring of 2019, the Beth-El Center, Inc. (“Beth-El”) embarked on a strategic planning process to develop a roadmap for organizational development over the next two to three years. The plan is intended to drive positive change while embracing continuity and to provide a sharper focus for alleviating homelessness and hunger in the Milford area.

Beth-El has a rich history in the Milford community, dating back over 30 years. Founded by a small group of Milford clergy and lay people who called a meeting to discuss how people of faith could respond to the needs of hungry and homeless in greater New Haven, the Beth-El Center now provides support services and advocacy to those experiencing homelessness and hunger within the Greater Milford community with a 34-bed homeless shelter, food service programs, and outreach and engagement efforts. The staff at Beth-El strives to help each and every person – individuals, families, and veterans – secure a place to live, sustainable income, and support services in order to return to self-sufficiency and reclaim their lives.

Over the course of the last six months, the Strategic Planning Committee, has been hard at work on Beth-El’s new Strategic Plan, refining their objectives, and reinforcing their commitment to a new mission and to their program activities. The plan allows for the traditional responsibilities of outreach, engagement, food, and shelter to remain central to the Beth-El’s work while opening the door to new ideas and concepts, and embracing new methods of delivery and outreach. The plan also allows Beth-El to explore possible expansion and growth opportunities to maximize partnership opportunities and continue alleviating homelessness and hunger for those in need.

It is critical to point out that it took a coordinated and collective effort to accomplish this Strategic Plan. Volunteer board members and the organization’s Executive Director, all shared their expertise, gave generously of their time, and worked together to achieve goals that will benefit Beth-El for many years to come. The Strategic Planning process was led by consultants from The Strategy Group LLC, Karen Brennan and Debra Hertz.

Beth-El has a new vision, mission, and values that better reflect the community’s needs today. The organization will broaden community awareness and support with increased social media, television, and online presence, renewed marketing materials, and an updated web site; explore facilities expansion; pursue partnerships for housing opportunities; and finally explore a number of new and exciting ways to increase fundraising and donor engagement. There is much to be excited about.

Beth-El looks forward to implementing this plan in 2019 and beyond with passionate people and new and ongoing resources. Moving forward, we will regularly review this plan, evaluate our progress, learn from our grantees and partners, and update the plan as necessary.

## The Planning Process

This Strategic Plan is the product of a six-month process that involved input from various stakeholders including community partners, churches, staff members, donors, former board members, volunteers, and clients. Facilitated by The Strategy Group, the plan followed the process outlined in Attachment 1. Key inputs to the planning process included:

**Strategic Planning Committee.** The Strategic Planning Committee was comprised of seven Board Members and one staff member (See Table 1).

**Table 1. Strategic Planning Committee Members**

<b>Board Members</b>	<b>Staff Members</b>
1. Marilyn Cormack, Chair, Strategic Planning Committee	1. Jennifer Paradis, Executive Director
2. Ed Davies, President	
3. Shaileen Landsberg, Secretary	
4. Al May	
5. Eileen Schuman	
6. Joanne Walsh	
7. Jim Winkel	

**Environmental Scan.** The Beth-El Environmental Scan had two parts: 1) an online survey sent to volunteers who regularly come and work at the shelter either in the office or the soup kitchen, and 2) multiple stakeholder focus groups and interviews with Beth-El members, donors, community partners, staff, residents, and soup kitchen patrons. Between the surveys, interviews, and focus groups, The Strategy Group heard from a total of 62 people.

A brief summary of the key themes is offered in Table 2.

**Table 2. Key Themes from Environmental Scan**

<b>Strengths</b>	<ul style="list-style-type: none"> <li>• Beth-El has a 30-year history and is an integral part of the Milford community.</li> <li>• Well respected programming: Through its shelter, soup kitchen, and support services, Beth-El helps individuals and families reclaim their lives from the effects of unemployment, addiction, mental illness, and unexpected catastrophic life events.</li> <li>• <i>“Beth-El gives people hope that their lives can change.”</i></li> <li>• The organization has a caring and dedicated staff and board of directors; very dedicated group of volunteers who give tirelessly of their time</li> <li>• Known as a <i>“safe, open and welcoming”</i> place for clients.</li> <li>• Thought of as a well-respected partner, one always willing to <i>“collaborate”</i> and <i>“work out-of-the-box”</i> to solve problems.</li> </ul>
<b>Weaknesses</b>	<ul style="list-style-type: none"> <li>• Milford-centric – Beth-El not well known in surrounding communities.</li> <li>• Need more permanent subsidized housing, more beds; facilities need improvements.</li> <li>• No Director of Development, additional staffing support needed for No Freeze Shelter.</li> <li>• Understaffed in some areas – Jenn is stretched very thin.</li> <li>• Staff needs more professional development.</li> <li>• Clients unhappy with some of the rules, would like to see improvements in the menu.</li> </ul>
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>• Communications – <i>“people fear what they don’t know”</i> – need to be better educated about homelessness and what to do to help; may lead to fundraising opportunities.</li> <li>• Explore other shelter models – look at adding breakfast and different meals-to-go.</li> <li>• Consider moving No Freeze Shelter to alternate locations, partnering with local churches who have more space.</li> <li>• Reconfigure current space to be an all-purpose space with clothing center, food pantry, showers, laundry, mail, and soup kitchen – and perhaps day care.</li> <li>• Partnerships – continue to foster and grow relationships – look for places to fundraise together, especially where there is opportunity to add more staff (like at the Library) or to collaborate around data (like with the Health Department).</li> <li>• Expand beds, add more permanent supportive housing.</li> </ul>
<b>Threats</b>	<ul style="list-style-type: none"> <li>• The need for food, shelter, and emergency assistance is only going to increase – as will demand for Beth-El’s core services.</li> <li>• More nonprofits are competing for same dollars; funders giving less to many organizations.</li> <li>• Volunteer population is aging and it is increasingly harder to find volunteers.</li> <li>• State dollars continue to be cut.</li> <li>• Many older donors are moving out of state.</li> </ul>

### Strategic Planning Committee Meetings

A full-day board retreat was held in June of 2019. From late June to mid-September, the Strategic Planning Committee met for close to 20 hours to create a new strategic plan designed to help Beth-El evaluate its operations and plan for growth. The Committee worked to develop new mission, vision, and values statements, identify strategic opportunity areas, and develop measurable strategies for each strategic opportunity area. The following strategic opportunity areas were identified:

1. Communications
2. Facility Utilization & Expansion
3. Housing Opportunities
4. Human Resources
5. Financial Sustainability

The strategic recommendations that follow are intended to provide Beth-El with a roadmap to continue strengthening its infrastructure and programs.

### **Beth-El Center's Assumptions and Priorities**

It is important to recognize that the Strategic Planning Committee created this plan with some key assumptions and priorities firmly in place:

1. The current building does not serve the day-to-day needs of the organization well and parking is difficult, but the location and proximity to community partners outweighs looking for an alternate location. Beth-El Center will look to redesign and expand its current space long-term.
2. Beth-El remains committed to shelter and food, but does not see these as solutions to homelessness. To this end, the organization plans to explore expansion into long-term supportive housing in the next several years.
3. Beth-El is blessed to have a dedicated and committed staff. To implement and carry out many of the strategies outlined in the plan, new and temporary ad-hoc board and advisory committees are being considered to help support the important work being proposed.

## Beth-El Center Programs at a Glance

Beth-El Center provides hope and opportunity to those in need. The organization provides basic resources such as food and shelter but more importantly, with programs help empower people toward self-sufficiency.

From emergency shelter program for individuals and families to its soup kitchen to the outreach and engagement program, Beth-El provides a continuum of services to meet the basic needs of those experiencing homelessness and food insecurity in the community. Beth-El's programs and services include:



## Guiding Statements: Vision, Mission, Values

CURRENT VISION	NEW VISION
To care for and meet the needs of the hungry and homeless and to prevent and end homelessness.	Everyone is home and all are fed.

CURRENT MISSION	NEW MISSION
To alleviate homelessness and hunger in the Milford area through shelter, support services, advocacy and community education in partnership with the faith-based community and public and private organizations.	Beth-El extends dignity and respect to all individuals and families while connecting them to housing, food, and services within their communities.

### BETH-EL CENTER VALUES

**Respect:**  
We treat all those through who walk through our doors to with respect and dignity.

**Integrity:**  
We maintain the highest professional standards, and strive to be honest and fair in all that we do.

**Community:**  
We value our relationships and partnerships, and ensure that everyone feels a sense of connection and belonging.

**Collaboration:**  
We bring our individual skills and strengths, believing best results arise from teamwork.

**Commitment:**  
We are dedicated to our mission, meeting challenges together.



## Goals and Strategies

During the Strategic Planning process, the Strategic Planning Committee completed an analysis of strengths, weaknesses, opportunities, and threats (SWOT); identified five strategic opportunity areas; and developed goals and an action plan for each area. The Action Plan that follows outlines strategies for achieving each goal and target completion dates.

1. **COMMUNICATIONS** – *To improve and expand awareness and regional outreach in order to educate the community, build stronger awareness and participation, and increase financial support.*
2. **FACILITY UTILIZATION & EXPANSION** – *To determine how to utilize space more efficiently and to enhance Beth-El’s space to improve service delivery, productivity, and community reach.*
3. **HOUSING OPPORTUNITIES** – *To create sustainable housing opportunities for people who are experiencing homelessness.*
4. **FINANCIAL SUSTAINABILITY** – *To secure resources to fully support the Beth-El’s annual operating and capital needs.*
5. **HUMAN RESOURCES** – *To attract and retain a committed, skilled, and diverse team of staff and trained volunteers to achieve Beth-El Center’s mission within a culture where all feel appreciated and able to contribute.*

## Action Plan by Strategic Area of Focus

### Strategic Opportunity 1 – Communications

Beth-El has plans to broaden awareness of homelessness and hunger within the community and to educate the public about the services it provides to meet those needs. There is much to be done in the areas of advocacy and education. Creating and implementing a communications plan to include increased social media, traditional media, revamped printed materials and a speaker’s bureau, among other things, will be important in our efforts to gain traction inside and outside of Milford and into neighboring communities. This will also lend itself to widening the pool of individuals and bigger donors for fundraising.

<b>Communications Goal:</b> <i>To improve and expand awareness and regional outreach in order to educate the community, build stronger awareness and participation, and increase financial support.</i>		
<b>Strategy</b>	<b>Who</b>	<b>Timeline</b>
1-1. Develop a Communications Sub-Committee	Chair, Board; Executive Director	Q4 12/31/19
1-2. Create an annual communications plan	Chair; Communications Committee; Marketing Consultant; Executive Director	Q1 3/31/20
1-3. Audit and refresh website	Chair; Communications Committee; Marketing Consultant; Website Developer	Q3 9/30/20
1-4. Audit and refresh communications materials	Chair; Communications Committee; Marketing Consultant; Executive Director	Q3 9/30/20
1-5. Develop Presentation Toolkit and possible Speaker’s Bureau	Chair; Communications Committee; Executive Director	Q4 12/31/20
1-6. Increase social media presence (e.g., Facebook, Instagram, YouTube, LinkedIn)	Chair; Communications Committee; Marketing Consultant; Executive Director	Ongoing
1-7. Expand positive media presence in television, print, and web	Chair; Communications Committee; Marketing Consultant; Executive Director	Ongoing

## Strategic Opportunity 2 – Facility Utilization & Expansion

The physical Beth-El location has many limitations and the facility is showing its age. Yet the building is in a prime location in Milford and with some thoughtful planning and redevelopment, holds great opportunity for an all-purpose center that would include shelter, soup kitchen, laundry, mail, and showers, and offer space for a small clothing center, food pantry, classrooms, and/or a daycare center.

<b>Facility Utilization &amp; Expansion Goal:</b>		
<i>To determine how to utilize space more efficiently and to enhance Beth-El's space to improve service delivery, productivity, and community reach.</i>		
<b>Strategy</b>	<b>Who</b>	<b>Timeline</b>
2.1. Add breakfast to the soup kitchen meal schedule	Executive Director; Soup Kitchen Manager	Q4 12/31/19
2-2. Explore potential partnership to move No Freeze Shelter off site	Executive Director	Q1 3/31/20
2-3. Create Building Exploratory committee	Chair, Building Exploratory Committee; Executive Director	Q3 9/30/20
2-4. Hire space planning consultant and/or architect to conduct facilities audit	Chair, Building Exploratory Committee; Executive Director	Q4 12/31/20

### Strategic Opportunity 3 – Housing Opportunities

At the heart of the Beth-El organization, is its **homeless shelter**, a form of assistance that provides men, women and families a temporary place to stay. There is no cost to use the shelter and the average length of stay ranges from 1 day to 90 days with the opportunity to apply for an extension. The housing is dormitory-style for single men and women that unfortunately does not allow a significant amount of privacy. Families have individual bedrooms with a common living room and kitchen.

Beth-El recognizes that permanent supportive housing is a proven solution to homelessness for the most vulnerable, **chronically** homeless people and plans to pursue opportunities to secure more housing for more people in need. **Permanent supportive housing** is an intervention that combines subsidized housing assistance (30% of tenant’s gross income) with voluntary support services. This is the type of assistance Beth-El currently offers at Liberty Pointe. When paired with case management and supportive services, housing of this type is a way for people to reclaim their lives and gain long-term stability. Although called permanent housing, this is a non-time limited intervention and support services encourage “moving on” when stability has been achieved.

**Rapid re-housing** is an intervention designed to help individuals and families that don’t need intensive and ongoing supports to quickly exit homelessness and return to permanent housing. It typically involves programs aimed at providing funds to assist with move-in costs, security deposits, rental payments, and utility assistance. Support Services can also be paired with financial support although this is not the case in every rapid rehousing model. Beth-El will look to explore rapid rehousing and will pursue partnerships which offer stronger impact and reach, as well as funding collaborations.

**Transitional housing**, of which Beth-El does not offer, by definition is any type of stay that is designed to provide homeless individuals and families with the interim stability and support to successfully move to and maintain permanent housing. This will not be pursued at this time.

<b>Housing Opportunities Goal:</b>			
<i>To create sustainable housing opportunities for people who are experiencing homelessness.</i>			
<b>Strategy</b>	<b>Who</b>	<b>Timeline</b>	
3-1. Pursue permanent supportive housing opportunities	Executive Director	Ongoing	
3-2. Explore rapid rehousing opportunities – Investigate regional program models, explore partnership opportunities, explore funding opportunities	Executive Director	Ongoing	

## Strategic Opportunity 4 – Human Resources

Beth-El has a staff of deeply passionate and dedicated individuals who care deeply about the clients the organization serves. With some dedicated and regular professional development, the staff will be able to enhance operations and employee effectiveness. Professionalizing the Human Resources functions and refining the organization structure will strategically position the organization for growth.

<b>Human Resources Goal:</b>		
<i>To attract and retain a committed, skilled, and diverse team of staff and trained volunteers to achieve Beth-El Center’s mission within a culture where all feel appreciated and able to contribute.</i>		
<b>Strategy</b>	<b>Who</b>	<b>Timeline</b>
4-1. Review and refine organizational structure <ul style="list-style-type: none"> <li>• Review and revise job descriptions</li> <li>• Potentially shift responsibilities, create new positions</li> </ul>	Executive Director; Personnel Committee	Q1 3/31/20
4-2. Create annual staff recognition opportunities from board	Chair, Board	Q1 3/31/20
4-3. Professionalize Human Resources functions	Executive Director; Personnel Committee	Q4 12/31/20
4-4. Support professional development for all staff	Executive Director	Ongoing

## Strategic Opportunity 5 – Financial Sustainability

Beth-El is currently financially stable, but the board recognizes the changing landscape and the need for a robust fundraising plan that will fill foreseeable gaps of funders leaving the area or of family foundations choosing to end long-term giving. As Facility Expansion plans take shape, it is likely that a Capital Campaign will be necessary to raise funds for this important work.

<b>Financial Sustainability Goal:</b>		
<i>To secure resources to fully support the Beth-El's annual operating and capital needs.</i>		
<b>Strategy</b>	<b>Who</b>	<b>Timeline</b>
5-1. Build a more diverse and impactful board by adding members with varied skill sets	Governance Committee	Q4 12/31/19
5-2. Develop fundraising plan which targets individual donors within Milford, and corporations and foundations	Chair, Development Committee; Executive Director	Q4 12/31/19
5-3. Create Capital Campaign exploratory committee	Chair, Board	Q3 9/30/20
5-4. Conduct Capital Campaign	Chair, Capital Campaign Committee TBD	Q1 3/31/21
5-5. Create Young Professionals Board	Executive Director	Q1 3/31/21

# Dashboard

## Strategic Areas of Focus:

1. Communications (Orange)
2. Facilities Utilization & Expansion (Yellow)
3. Housing (Light Blue)
4. Human Resources (Dark Blue)
5. Financial Sustainability (Green)

	FY 2019	FY 2020				FY 2021			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1-1. Develop a Communications Sub-Committee	Q4 12/31/19								
2-1. Add breakfast to the soup kitchen meal schedule	Q4 12/31/19								
5-1. Build a more diverse and impactful board by adding members with varied skill sets	Q4 12/31/19								
5-2. Develop fundraising plan which targets individual donors within Milford, and corporations and foundations	Q4 12/31/19								
1-2. Create an annual communications plan		Q1 3/31/20							
2-2. Explore potential partnership to move No Freeze Shelter off site		Q1 3/31/20							
4-1. Review and refine organizational structure		Q1 3/31/20							
4-2. Create annual staff recognition opportunities from board		Q1 3/31/20							
1-3. Audit and refresh web site				Q3 9/30/20					
1-4. Audit and refresh communications materials				Q3 9/30/20					
2-3. Create Building Exploratory committee				Q3 9/30/20					
5-3. Create Capital Campaign exploratory committee				Q3 9/30/20					
1-5. Develop Presentation Toolkit and possible Speaker's Bureau					Q4 12/31/20				
2-4. Hire space planning consultant and/or architect to conduct facilities audit					Q4 12/31/20				
4-3. Professionalize Human Resources functions					Q4 12/31/20				
5-4. Conduct Capital Campaign						Q1 3/31/21			

5-5. Create Young Professionals Board						Q1 3/31/21			
1-6. Increase social media presence	Ongoing								
1-7. Expand positive media presence in television, print, and web	Ongoing								
3-1. Pursue permanent supportive housing opportunities	Ongoing								
3-2. Explore rapid rehousing opportunities – Investigate regional program models, explore partnership opportunities, explore funding opportunities	Ongoing								
4-4. Support professional development for all staff	Ongoing								



